

PRESS RELEASE

IAA Mobility 2025

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Car nation meets innovation lab: What drivers in China and Germany want – AUMOVIO Mobility Report reveals

- **AUMOVIO Mobility Report reveals market-specific preferences for the car of the future: In Germany significant skepticism about autonomous driving**
- **Despite challenges in the market: European Brands are still attractive in China**
- **AUMOVIO mobility Report is based on data collected by the market research institute YouGov**
- **Philipp von Hirschheydt, CEO of AUMOVIO: “The findings of the AUMOVIO Mobility Report clearly show that a ‘one-size-fits-all’ strategy is not effective for global automotive companies. A differentiated market approach tailored to each region is key to success.”**

Frankfurt/Munich, September 8, 2025. While drivers in China primarily want advanced technologies for their car of the future, German drivers focus mainly on safety. This is one of the key findings of the latest AUMOVIO Mobility Report, an international comparative study on the future of mobility, presented by AUMOVIO at the start of IAA Mobility 2025 in Munich.

According to the study, 58 percent of German drivers consider advanced safety systems to be an important feature for the car of tomorrow. In comparison, Chinese respondents show more flexibility in their preferences with 37 percent of drivers highlighting these systems. For 44 percent of Chinese participants, an electric range of more than 600 kilometers was the most important feature of the future vehicle (Germany: 50%). Another striking difference: autonomous driving functions are considered significantly more important in China (39%) than in Germany (15%).

The AUMOVIO Mobility Report is based on data collected by the market and opinion research institute YouGov. Around 1,000 individuals from Germany and from metropolitan regions in China were surveyed via online interviews. All participants hold a driver's license and drive a car either occasionally or regularly.

Tailored market approach is key

“The findings of the AUMOVIO Mobility Report clearly show that a ‘one-size-fits-all’ strategy is not effective for global automotive companies. A differentiated market approach tailored to each region is the key to success,” says Philipp von Hirschheydt, CEO of AUMOVIO. “Those operating globally must understand regional expectations and address them with targeted, innovative technologies. A successful presence in key international markets, particularly in Germany and China, requires a deep and nuanced understanding of local customer needs.”

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This is confirmed by the survey results, which offer encouraging insights for Europe's automotive industry: 30 percent of Chinese drivers would choose a European car for their next purchase and 32% would opt for a Chinese brand. It shows European cars are still attractive for Chinese consumers although facing many challenges. Conversely, while the report confirms that Chinese vehicles have gained relevance in Germany, fewer than one in ten German drivers would consider a Chinese car as their next vehicle. More than half of German respondents would currently opt for a European car.

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Made in Europe vs. made in China: Brand preferences and purchase intentions in detail

Models from China and Europe are considered as potential next vehicles by drivers in both markets—but for entirely different reasons. German customers primarily focus on price when it comes to Chinese brands. According to the AUMOVIO Mobility Report, more than half of respondents cited good value for money (59%) and reliable quality (52%) as key factors. On the other hand, Chinese customers who are open to purchasing a European model, place a greatest emphasis on brand reputation (brand heritage and status symbol: 66%) as well as on materials and high-quality craftsmanship (66%). Competitive pricing is only a purchase criterion for one in five Chinese respondents (22%). Germany views Chinese cars mainly through the lens of price-performance and pays little attention to the advanced features Chinese vehicles are known for. For Chinese consumers, buying a European model is primarily a recognition of the brands' enduring heritage and proven high quality.

AUMOVIO's portfolio meets demand in both China and Europe

Acceptance of modern technology is high in both markets. In Germany (63%) and China (80%), people do not feel overwhelmed by new technologies in their vehicles. "Customers in Germany – Europe's largest automotive market – and in China, want integrated solutions that cover the entire vehicle ecosystem, from individual components to complete systems. That is exactly what we focus on," says Philipp von Hirschheydt, CEO of AUMOVIO. The AUMOVIO Mobility Report reinforces the company's commitment to developing further innovative features that will make driving in the future more connected, safer, more exciting, and increasingly autonomous.

Significant differences in acceptance of autonomous driving functions

When asked about the most important technological features for their future car, German drivers named built-in navigation with real-time traffic information (85%), good smartphone integration (66%), and driver assistance systems (61%). These features are also valued in China, but unlike in Germany, Chinese respondents additionally favor AI-powered voice assistants (71%, Germany: 39%) and autonomous driving functions (70%, Germany: 32%).

Autonomous driving, in particular, reveals the greatest market differences. 68% of Chinese respondents believe that autonomous driving increases road safety, compared to just 38% in Germany. Evolution versus revolution – the figures clearly illustrate how differently the two societies perceive technology: while German consumers aim to perfect existing technologies, Chinese drivers aspire to elevate the car of tomorrow to an entirely new level.

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Extensive YouGov survey highlights differences between China and Germany

The data for the AUMOVIO Mobility Report is based on online interviews conducted with members of the YouGov panel who had previously agreed to participate. Between July 28 and August 5, 2025, a total of 2,104 individuals in Germany and China were surveyed. All participants hold a valid driver's license and drive a car either occasionally or regularly. The survey in Germany was quota-based by age, gender, and region; the survey in China was quota-based by age and gender. The results were subsequently evaluated accordingly.

AUMOVIO continues the business of the former Continental group sector Automotive as an independent company with its spin-off in September 2025. The technology and electronics company offers a wide-ranging portfolio that makes mobility safe, exciting, connected, and autonomous. This includes sensor solutions, displays, braking and comfort systems as well as comprehensive expertise in software, architecture platforms, and assistance systems for software-defined vehicles. In the fiscal year 2024 the business areas, which now belong to AUMOVIO, generated sales of 19.6 billion Euro. The company is headquartered in Frankfurt, Germany and has about 87.000 employees in more than 100 locations worldwide.

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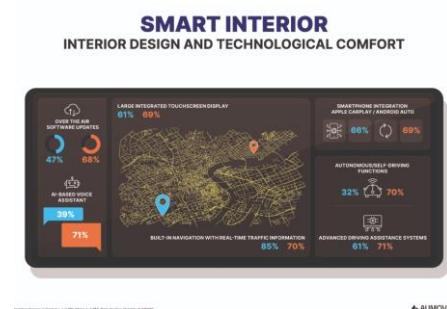
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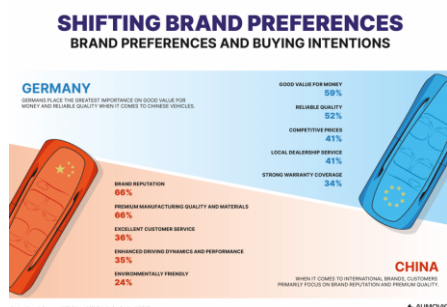
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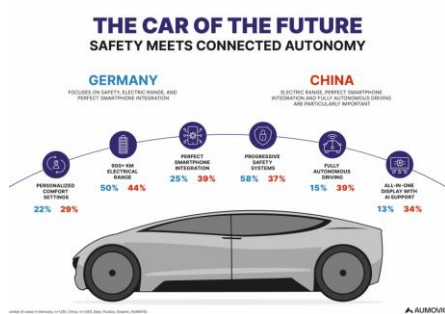


Technology preferences for the interior



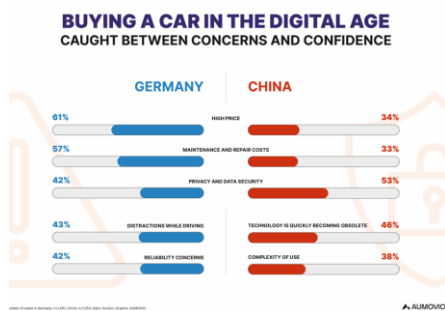
Shifting brand preferences for Chinese and European vehicles

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Car of the future:
Safety versus
connected autonomy

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Technology
preferences and
concerns